

Tuition Benefit Reimbursement Application

(Form ER-75, Revised 08/2006)

Training & Development Services Section
Department of Employee Relations
200 E. Wells Street, Room 706
Milwaukee WI 53202-3554
Phone: 414.286.3650 / Fax: 414.286.0800
Email: jkamme@milwaukee.gov

DO NOT use a pencil to complete this application. Use a typewriter or complete by hand with black ink.

Section 1 - Applicant Information

| | | |
|--------------------------------|---|---|
| NAME: | | (WORK): Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> |
| Home Address: | | Zip Code: 532_____ |
| Department & Division/Sect.: | | Employee 6-digit I.D. #: |
| Approval Determination Letter: | <input type="checkbox"/> I have neither a personal or work Email address; mail the letter to the address listed <u>above</u> . <input type="checkbox"/> Email the Approval Determination Letter to my City (work) Email address. <input type="checkbox"/> Email the Approval Determination Letter to my personal Email address provided below: Personal Email Address: | |

Section 2 - Course Information

For each course taken, you must indicate (in the column below) whether the course is related to your current position ("C") or to a promotional opportunity ("P") within City government. PLACE A CHECK MARK IN THE COLUMN BELOW IF YOU ATTENDED THE COURSE ON CITY TIME (*not on your own time*).

| COURSE TITLE (list the actual course title) | CITY TIME | "C" or "P" | START DATE (mo/day/year) | END DATE (mo/day/year) | TUITION COST |
|---|-----------|------------|--------------------------|------------------------|--------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Section 4 - Textbook / Equipment / Supply Information

List **each** textbook title, equipment and supply cost **INDIVIDUALLY**. **Reimbursement only covers required textbooks.** If your bargaining unit is eligible for equipment and supply reimbursement, list the names of **ALL** items and costs **INDIVIDUALLY** or this application will be returned to you. The Tuition Benefit **DOES NOT** cover sales tax or shipping/handling fees (*see the Administrative Guidelines*).

| TEXTBOOK TITLE / EQUIPMENT & SUPPLY DESCRIPTION | COST (without sales tax) |
|---|--------------------------|
| 1) | \$ |
| 2) | \$ |
| 3) | \$ |
| 4) | \$ |

This section is for Employee Relations' use only.

| | | | | |
|------------------------------------|----------------|-----------|----------------|-----------------|
| _____ Approved | Tuition / Dues | Textbooks | Equip/Supplies | TOTAL: |
| _____ Not Approved | 1) | | | \$ |
| Previous Reimbursement: | 2) | | | \$ |
| | 3) | | | \$ |
| | 4) | | | \$ |
| Pay Date: | | | | |
| Pay Code: 904 / 927 / 928 / 929 | COMMENTS: | | | Total Reimb: \$ |

Section 5 – Course Justification

Explain how the course(s) relate to your current position or to a reasonable promotional opportunity within City government. If the course(s) are electives towards a degree you are seeking, state your major, and explain how the degree relates to your present position or to a promotional opportunity (*Attach an extra sheet if necessary.*)

Section 6 – Type of Course(s) Taken

- | | |
|---|--|
| <input type="checkbox"/> Undergraduate-Level Course (<i>Associate or Bachelor's Degree</i>) | <input type="checkbox"/> Correspondence Course |
| <input type="checkbox"/> Graduate-Level Course (<i>Master's or Ph.D.</i>) | <input type="checkbox"/> Continuing Education Credit |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Certificate Program |

Section 7 – Eligibility for Other Educational Benefits

Have you received a grant, scholarship or state/federal veteran's benefit for the course(s) listed on this application?

NO ☐ YES ☐

If YES, you may receive reimbursement for any costs **not** covered by the grant, scholarship or veteran's benefit.

If YES, how much did you receive? \$ _____: ☐ per Class or ☐ per Semester

Which benefit did you receive? **Check all that apply:** Grant ☐ / Scholarship ☐ / State/Federal Veteran's Benefit ☐

Section 8 -- Applicant Signature

- I have read the instructions and Administrative Guidelines and I agree to abide by them.
- I understand my Department/Agency Head and Employee Relations must approve this application if I take the course on "City Time" and not on my own time. (**Not all bargaining units are eligible for "City Time."**)
- If I register for a course offered by Employee Relations (DER) and fail to cancel by the cancellation date, do not attend, or do not pass or complete the course, I agree to pay for the full course registration fee. Otherwise, I authorize the course registration fee to be deducted from my paycheck.

Please Sign Here →

Date:

If you attended the course(s) on your own "time" you may mail or fax this application AND all required documents directly to Training & Development Services.

DEPARTMENT/AGENCY HEAD SIGNATURE AND APPROVAL

- The courses are directly related to the applicant's present position or to a reasonable promotional opportunity within City government.
- The courses indicated taken "on City Time" is approved to be on City Time.

Date:

Dept/Agency Head Signature: →

Date:

Supervisor's Initials: (*optional*)→

FORM ER-75 SUPPLEMENTARY APPLICATION

Please use this form if:

- ✓ You are applying for additional courses.
- ✓ You are applying for additional textbooks, equipment or supplies.

Section 2 - Course Information

For each course taken, you must indicate (in the column below) whether the course is related to your current position ("C") or to a promotional opportunity ("P") within City government. **PLACE A CHECK MARK IN THE COLUMN BELOW IF YOU ATTENDED THE COURSE ON CITY TIME (not on your own time).**

| | COURSE TITLE (list the actual course title) | CITY TIME | "C" or "P" | START DATE (mo/day/year) | END DATE (mo/day/year) | TUITION COST |
|----|---|-----------|------------|--------------------------|------------------------|--------------|
| 5) | | | | | | \$ |
| 6) | | | | | | \$ |
| 7) | | | | | | \$ |
| 8) | | | | | | \$ |

Section 4 – Textbook / Equipment & Supply Information

List **each** textbook, equipment and supply cost **INDIVIDUALLY**. **Reimbursement only covers required textbooks.** If your bargaining unit is eligible for equipment and supply reimbursement, list the names of **ALL** items and costs **INDIVIDUALLY** or this application will be returned to you. The Tuition Benefit **DOES NOT** cover sales tax or shipping/handling fees (see the Administrative Guidelines). **USE A SEPARATE SHEET TO LIST ADDITIONAL.**

| | TEXTBOOK TITLE / EQUIPMENT & SUPPLY DESCRIPTION | COST (without sales tax) |
|-----|---|--------------------------|
| 5) | | \$ |
| 6) | | \$ |
| 7) | | \$ |
| 8) | | \$ |
| 9) | | \$ |
| 10) | | \$ |

This section is for Employee Relations' use only.

| | | | | | |
|---------------------------|--------------|----------------|-----------|----------------|-----------------|
| _____ | Approved | Tuition / Dues | Textbooks | Equip/Supplies | TOTAL: |
| _____ | Not Approved | 5) | | | \$ |
| Previous Reimbursement: | | 6) | | | \$ |
| \$ | | 7) | | | \$ |
| Pay Date: | | 8) | | | \$ |
| | | COMMENTS: | | | Total Reimb: \$ |
| Pay Code: 927 / 928 / 929 | | | | | |

INSTRUCTIONS FOR FORM **ER-75** (Tuition Benefit) FOR COURSES MORE THAN **THREE** (3) WEEKS IN LENGTH

- ☒ Please use the separate **ER-75A** form to apply for Membership Dues Reimbursement.
- ☒ Please use the separate **ER-75C** form to apply for License or Certification fees. **NOTE:** Currently **only** City management is eligible for this benefit.
- ☒ Please use the separate **ER-75D** form to apply for conferences, conventions, seminars or courses of **less** than three (3) weeks in length.
- ☒ Please use the separate **ER-75D** form for courses offered in the Bulletin of Courses.

Once you have successfully completed a course of more than three (3) weeks in length, complete the application. You may apply for up to four courses on each application. There is a Supplemental Application sheet on Page 3 to list extra courses.

- 1. Please read the Administrative Guidelines.**
- 2. Complete Sections 1-8 of the application.** Please complete all Sections or the application may be returned to you, which will delay the reimbursement.
- 3. Attach a photocopy of one of the following:**
 - a. Official grade report (must be a "final" grade; "Mid-Term" grade reports are not acceptable).
 - b. Certificate of completion
 - c. Letter from the school or organization that states you successfully completed the course.
- 4. Attach a photocopy of a receipt that shows the tuition been paid for.** Please do not submit originals, as they will not be returned to you.
- 5. If you took a course for which textbooks were required,** attach a copy of a receipt. Please note that the Tuition Benefit only covers **required** textbooks. Please do not submit originals, as they will not be returned to you.
- 6. If you took a course for which equipment or supplies were required,** attach a copy of a receipt. Please note that the Tuition Benefit **does not** cover required equipment and supplies for all bargaining units.
- 7. If you are taking courses on "City time"** and not on your own time, please forward the completed application, along with all necessary documentation **directly** to your Department/Agency Head for approval and signature. Please note that **not** all bargaining units are eligible to take courses on "City Time."
- 8. If you are taking the courses on your own time,** please mail or fax (286-0800) the completed application, along with the necessary documentation directly to Training & Development Services, Room 706, City Hall.
- 9. You will receive an Approval Determination Letter** within four weeks from the date Training & Development Services receives the completed application and necessary documentation. The Letter will let you know on which paycheck the reimbursement will be added. In general, you will receive the reimbursement within eight (8) weeks from the date Training & Development Services received your application.

NOTE ON RECEIPTS:

- Whenever possible, copy all receipts unto one piece of paper (8½" x 11").
- Copy the completion statement (i.e., *grade report, certificate or letter of successful completion*) on a **separate** piece of paper. Please see the Administrative Guidelines for more details on receipts.

TUITION BENEFIT ADMINISTRATIVE GUIDELINES

- **"On City-Time" Use of Tuition Benefit:** Some unions and employee groups are eligible to take CRITICAL, JOB-RELATED COURSES on City-Time. Your Department/Agency Head and Employee Relations must approve courses. ALL other courses, seminars and conferences must be taken on the employee's own time. Please call 286-3387 with any questions or send an email to aknick@milwaukee.gov. NOTE: **Not** all bargaining units are eligible to use the Tuition Benefit for "on City-time" courses.
- **Part-Time Employees:** Part-Time employees are eligible for prorated Tuition Benefit provided they work a minimum of 40 hours per pay period. Employees working less than 40 hours per pay period are not eligible for the Tuition Benefit.
- **A valid receipt is required** for ALL course, seminar, convention, conference and membership dues reimbursement requests. However, courses offered in Employee Relations' Bulletin of Courses do not require a receipt, as there is no upfront payment.
- **Definition of an Acceptable Receipt:** Receipts MUST show that payment was made, as well as the amount paid. Examples of acceptable receipts include: cash register receipt, canceled check (copy of both sides required), money orders, credit card statements, or official receipts provided by the school or organization. Bank statements are acceptable when accompanied by a copy of the front of the check or check carbon.
- **Unacceptable receipts include** invoices or registration forms requesting payment, receipts that show payment was made by another person, or receipts that are not legible.
- **Approval Determinations for Courses:** If you want to know in advance if a course will be approved for reimbursement, please call 286-3650 or 286-3387. Courses must be taken at accredited institutions, schools or organizations approved by Employee Relations. The reimbursement is based on courses taken during the calendar year (January - December) and is **always** applied to the year in which a course begins.
- **Approval Determination for Membership Dues:** If you want to know in advance if a membership will be approved for reimbursement, please call 286-3650 or 286-3387. Not all bargaining units are eligible for membership dues. Organizations MUST be nonprofit, nonsectarian and established for the expressed purpose of providing information, resources and programming that benefit its members in their professional specialties. Membership dues are applied to the year in which the enrollment period begins. Membership dues reimbursement DOES NOT include union dues.
- **Grade Reports and Completion Statements:** For college courses, the minimum grade accepted as satisfactory completion is a final grade that represents the minimum grade point average required for a degree, diploma or certificate. "Mid-Term" grade reports are NOT acceptable. Conferences, conventions and seminars DO NOT require a grade report or completion statement.
- **Tuition Reimbursement and Membership Dues Benefits Do Not Cover:** Non-required textbooks, union dues, finance charges, sales tax, licenses, certifications, examinations, shipping/handling charges, late and administrative fees, travel expenses (IE: lodging, meals, mileage), parking fees, magazine/journal/ periodical subscriptions, equipment or supplies. Certain bargaining units are eligible for REQUIRED equipment and supply reimbursement.
- **Seasonal Layoff and Unpaid Leaves of Absence:** If you have started a course prior to going on seasonal layoff or an unpaid leave of absence, you will receive your reimbursement check when you return to work. You must still send in the application, receipts and completion statements within eight weeks of the end of the course. However, if you start a course while on an unpaid, involuntary Leave of Absence or Layoff, you are not eligible to receive reimbursement.
- **Taxes:** ALL courses, seminars and conferences, and membership dues are nontaxable. The reimbursement is added to your gross total, but not to taxable earnings and NO withholdings will be taken.
- **Resignations from City Employment:** If you resign from City employment within six months of receiving a Tuition Benefit, that amount will be withheld from your final paycheck. This does not apply to those who retire, transfer to the School Board, or whose positions are eliminated due to budget cuts. You will not receive reimbursement for a class if you leave prior to completing it.

WHAT THE TUITION BENEFIT DOES NOT COVER:

- Airfare
- Certification fees and renewals (*as of 1/1/05, general City management are eligible*)
- Courses where the tuition was paid for by a grant, scholarship or State/Federal veteran's benefits.
- Courses, seminars or conferences that began or were attended prior to City employment.
- Courses, seminars or conferences that began or were attended during an **unpaid** and/or voluntary leave of absence (i.e., voluntary layoff, educational leave of absence, etc.)
- Courses taken on "City" time (**see #3 below**)
- Equipment or supplies (i.e., calculators, disks, software, notebooks, paper, pencils, etc.) (**see #1 below**)
NOTE: The equipment and supplies must be REQUIRED in a successfully completed class (for those eligible to receive equipment and supply reimbursement).
- Examination Fees
- Finance charges
- I.D. fees
- Interest Charges
- Late fees
- License fees and renewals (*as of 1/1/05, general City management are eligible*)
- Lodging
- Meals
- Membership dues reimbursement (**see #2 below**)
- Mileage
- Parking fees
- Part-time employees with less than 40 hours per pay period are **not** eligible for the Tuition Benefit.
- Sales tax
- Shipping and handling charges
- Subscriptions to magazines, journals or periodicals (this also applies to Membership Dues reimbursement)
- Textbooks that were NOT required in a successfully completed course
- Transfer of Credit fees
- Union dues

Seasonal Layoff and Leaves of Absence

If you started a course prior to going on a seasonal layoff or unpaid leave of absence, you will receive your reimbursement when you return to work. However, if you start a course while on an unpaid and/or voluntary leave or layoff, you are not eligible to receive reimbursement.

NOTES:

1. Certain bargaining units are eligible to receive reimbursement for **required** equipment and/or supplies for a successfully completed course.
2. Certain bargaining units and employee groups are eligible for Membership Dues reimbursement.
3. Certain bargaining units and employee groups are eligible to take courses on "City Time" provided the course or seminar is critical to and directly related to the employee's present position.